INTELLIGENT CHOICE

Client information record and deletion confirmation

Where a client's information is held, and the letter to confirm it has gone

Version 1.4 | 31 October 2026 | Owner: Travis Shaw | Review: every 6 months | Printable blank copy

Use. Open one record per client when the engagement starts, and update it as systems are added. At the end, delete or return the information within 30 days (Standard Terms 8.7) unless the client asks us to keep it or the law requires. We keep the final deliverables and signed contract documents as our record (Standard Terms clause 8.8). Send the confirmation if the client asks. Save a copy per client.

Client information record

Client: | Engagement start: | Engagement end:

System or place	What is held	Who has access	Delete or return by	Done (date)

- ☐ Information about the client's customers or staff is noted above (minimise it, de-identify where practical).
- ☐ The client has been told the tools we use (Phase Schedule or in writing).
- ☐ Contract copies and invoices we must keep by law are listed separately and kept for the required period.

Reviewed by: | Date: | Next review:

Deletion confirmation (template)

Send by email from travis@intelligentchoice.digital, on request.

> **Subject: Confirmation of deletion of your information**
>
> Dear [Name],
>
> Following the end of our engagement on [date], we confirm that on [date] we deleted [or returned to you] the information we held for the work, including [list: documents, data extracts, board content, workflow data] from [list the systems]. We have kept only our signed contract documents and the final deliverables, as our record of the work done and what was agreed, and [invoices, which we must retain for tax and legal purposes until [date]] [or: nothing further].
>
> Run logs in our workflow tool are deleted automatically within 14 days. Our hosting provider's backups roll off on its own schedule. Please reply if you would like anything else confirmed.
>
> Kind regards,
> Travis Shaw
> Intelligent Choice AI Consulting
> travis@intelligentchoice.digital